Compass user manual

IPerity BV

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1 Online management and logging in

You can find Compass at https://www.demo.iperity.com/.
Here you can see the login screen of Compass as depicted in figure 1. You need to enter your username and password and press *Log on* to enter the site.

Figure 1: Login screen

2 My settings

Here you find information about your settings and the availability of the phone. An example is given in figure 2.

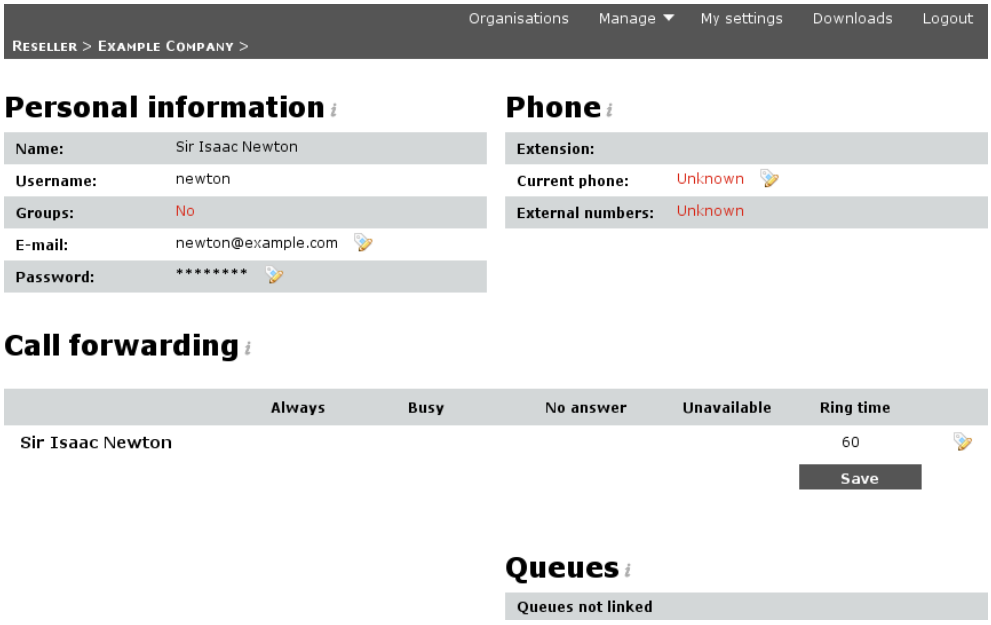

Figure 2: My settings

2.1 Personal information

Here you can adjust your password and e-mail address.

2.2 Phone

Here you can find the phone settings, adjust them, and manage your call waiting settings.

2.3 Call forwarding

Here you can manage incoming calls, e.g. when you are busy, could not answer the phone or are not reachable.

2.4 Queues

Here you can find the queues to which you have been added, e.g. the type of phone calls you can expect (for example sales of support).

3 Service codes

You can change your telephony settings within Compass bij dialling service codes. Service codes always start with an asterisk (*), followed by the desired service code and followed by the settings, depending in the requested service code. You can also configure these service codes as speed dials with the function keys of your phone, if programming function keys is supported for your type of phone. Below you can find the currently implemented service codes and their explanation.

3.1 *1: Log on and log off from your phone

By dialling *1, you can log on to your phone. If you were not logged on, you will hear a voice, asking you to enter your pincode, followed by the pound key (#). If you have configured a pin code for your extension, you will be requested to enter the code as well. If the pin code is correct, you will hear a voice indicating you have been logged on.
If a pin code is not configured for your extension, you will not be asked for it either. When the entered extension is known within your company, a voice will directly tell you you have been logged on.
Whenever you enter an invalid extension, you will be informed of this and the phone will be hung up immediately. If you enter a correct extension, but an invalid pin code, you may retry your pin code up to two times. Therefore, if you enter an invalid pin code three times in a row, the phone will be hung up.
If you were already logged on to the phone and dial *1, you will be logged off of your phone. This will also be indicated by the voice, saying “goodbye”.

3.2 *48: Log on and log off from a queue

You can dial a service code, starting with *48, to log on of log off from a queue within your company. The service code has to be followed by another asterisk and the queue shortcode. This queue shortcode can be configured by your administrator.
By default, when you log on to a queue, your identity will be configured in a way that your personal call forwards will **not** be followed in case you receive a call from the queue. Next to that, your identity will have priority 1 in the queue. This implies that your phone will ring immediately, according to the queue strategy, when an outside caller enters the specified queue.
It is possible to change these default settings by appending more parameters when dialling the service code. All parameters are separated by asterisks (*). As mentioned, the first setting is mandatory and is the queue shortcode. The second setting is optional and is used to indicate whether your personal call forwards should be followed. A one (1) tells Compass to follow them, a zero (0) lets the platform know you do not want your forwards to be followed.
With the last setting, you can control at which priority you will be logged on to the queue. This priority can be either 1, 2 or 3. The priority indicates the amount of use of the queue that should be reached, before incoming calls will be attempted to be delivered on your phone.

The optional settings can only be configured when you are currently logged off from the queue. If you pass extra settings whilst you are already logged on to the queue, you will be logged off of the queue. The extra settings will be ignored.
Below are a few examples to clarify the use of *48:

***48*8** If you are logged on to the queue with shortcode 8, you will be logged off. If you are not currently a member of the queue, you will be added to it with priority 1 and have your personal call forwards disabled if you receive calls from this queue.

***48*2*1** Log on to the queue with shortcode 2 with priority 1. Your personal forwards **will** be followed when you receive calls from that queue.

***48*4*0*2** Log on to the queue with shortcode 4 with priority 2. Your personal call forwards will **not** be followed.

4 Hosted Voice TAPI

4.1 Installation

If there is an older version of Hosted Voice TAPI installed, remove this version before proceeding.

Download Hosted Voice TAPI from the Downloads section at https://www.demo.iperity.com/. When the installation starts, the following screen appears:

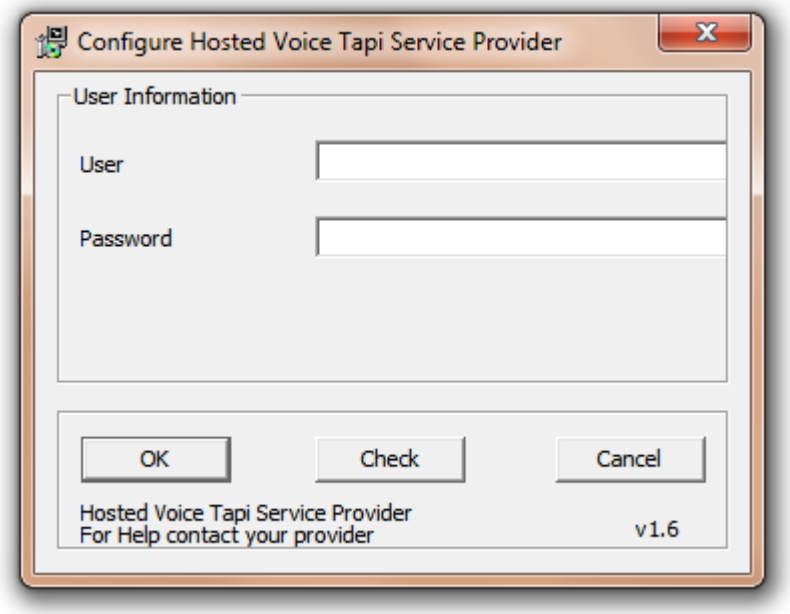

Figure 3: TAPI configuration

Here you fill in the following values:

- Username: your-username@uc.demo.iperity.com
- Password: your Compass password

The button “Check” checks if you have entered the correct values and if a connection can be established.

4.2 Uninstall

To uninstall the Hosted Voice TAPI Driver, go to Control Panel and choose “Uninstall a program”. Here the Hosted Voice TAPI Driver can be removed.

4.3 Shortcut for making a call using Outlook 2010

This is optional

1. Go to “File”, “Options”

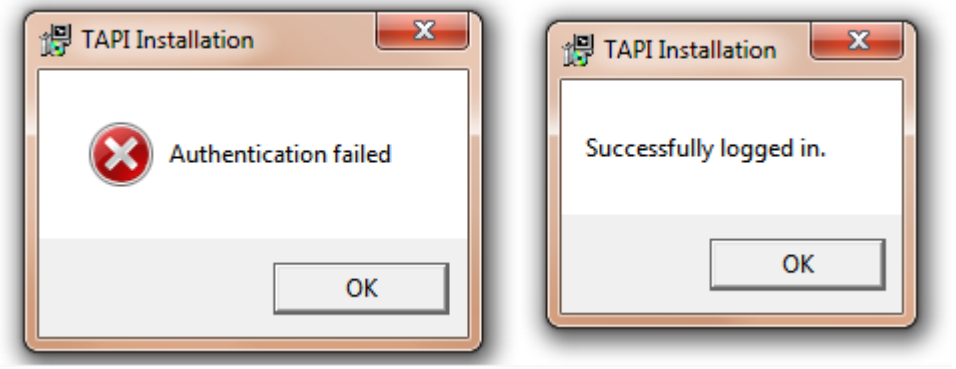

Figure 4: Check TAPI configuration

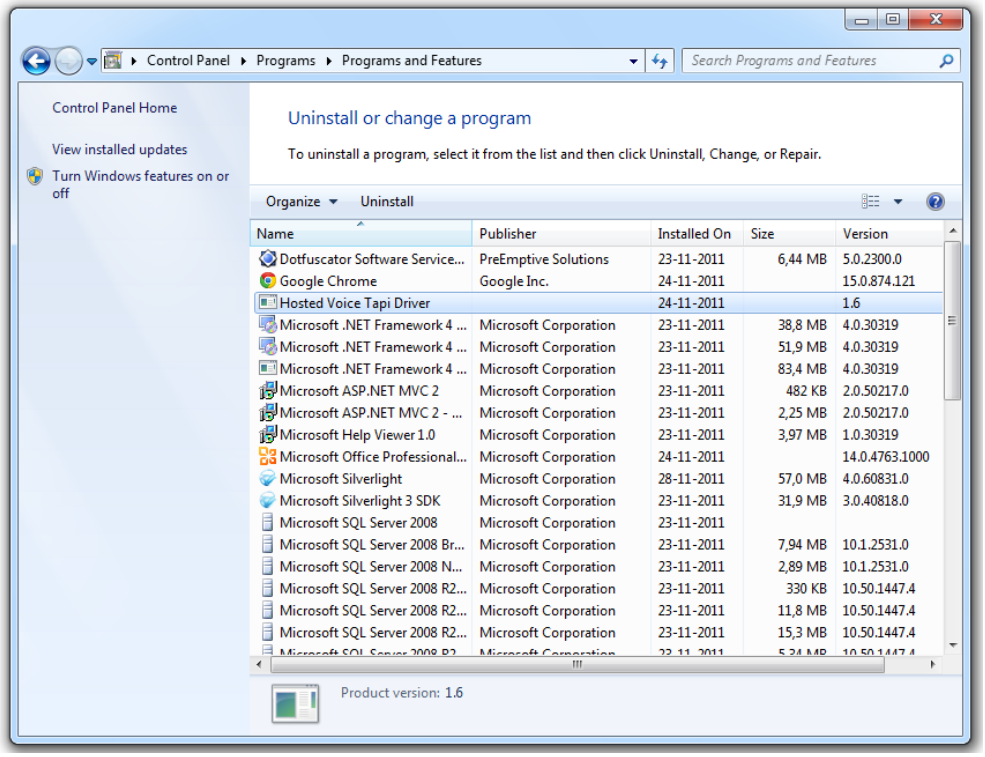
Control Panel ▸ Programs ▸ Programs and Features
Search Programs and Features
Control Panel Home
View installed updates
Turn Windows features on or off
Uninstall or change a program
To uninstall a program, select it from the list and then click Uninstall, Change, or Repair.
Organize
Uninstall
Name
Publisher
Installed On
Size
Version
Dotfuscator Software Service... PreEmptive Solutions 23-11-2011 6,44 MB 5.0.2300.0
Google Chrome Google Inc. 24-11-2011 15.0.874.121
Hosted Voice Tapi Driver 24-11-2011 1.6
Microsoft .NET Framework 4 ... Microsoft Corporation 23-11-2011 38,8 MB 4.0.30319
Microsoft .NET Framework 4 ... Microsoft Corporation 23-11-2011 51,9 MB 4.0.30319
Microsoft .NET Framework 4 ... Microsoft Corporation 23-11-2011 83,4 MB 4.0.30319
Microsoft ASP.NET MVC 2 Microsoft Corporation 23-11-2011 482 KB 2.0.50217.0
Microsoft ASP.NET MVC 2 - ... Microsoft Corporation 23-11-2011 2,25 MB 2.0.50217.0
Microsoft Help Viewer 1.0 Microsoft Corporation 23-11-2011 3,97 MB 1.0.30319
Microsoft Office Professional... Microsoft Corporation 24-11-2011 14.0.4763.1000
Microsoft Silverlight Microsoft Corporation 28-11-2011 57,0 MB 4.0.60831.0
Microsoft Silverlight 3 SDK Microsoft Corporation 23-11-2011 31,9 MB 3.0.40818.0
Microsoft SQL Server 2008 Microsoft Corporation 23-11-2011
Microsoft SQL Server 2008 Br... Microsoft Corporation 23-11-2011 7,94 MB 10.1.2531.0
Microsoft SQL Server 2008 N... Microsoft Corporation 23-11-2011 2,89 MB 10.1.2531.0
Microsoft SQL Server 2008 R2... Microsoft Corporation 23-11-2011 330 KB 10.50.1447.4
Microsoft SQL Server 2008 R2... Microsoft Corporation 23-11-2011 11,8 MB 10.50.1447.4
Microsoft SQL Server 2008 R2... Microsoft Corporation 23-11-2011 15,3 MB 10.50.1447.4
Product version: 1.6

Figure 5: Uninstall TAPI driver

2. Select “Customize Ribbon”
3. On the right side, expand “Start” (contacts) and add a new group, labeled “Call”
4. Choose the category “Commands Not in the Ribbon” on the left
5. Pick “Call” and press “Add”, which adds the “Call” command to the newly added group
6. Click “OK”
7. When viewing contacts, a button “Call” appears in the Ribbon on the top of the window

8. If “Start Call” does not ring your phone, follow these extra steps:

   (a) Click “Dialing Options...”

   (b) Under “Connect using line”, pick “Hosted Voice TAPI Driver”

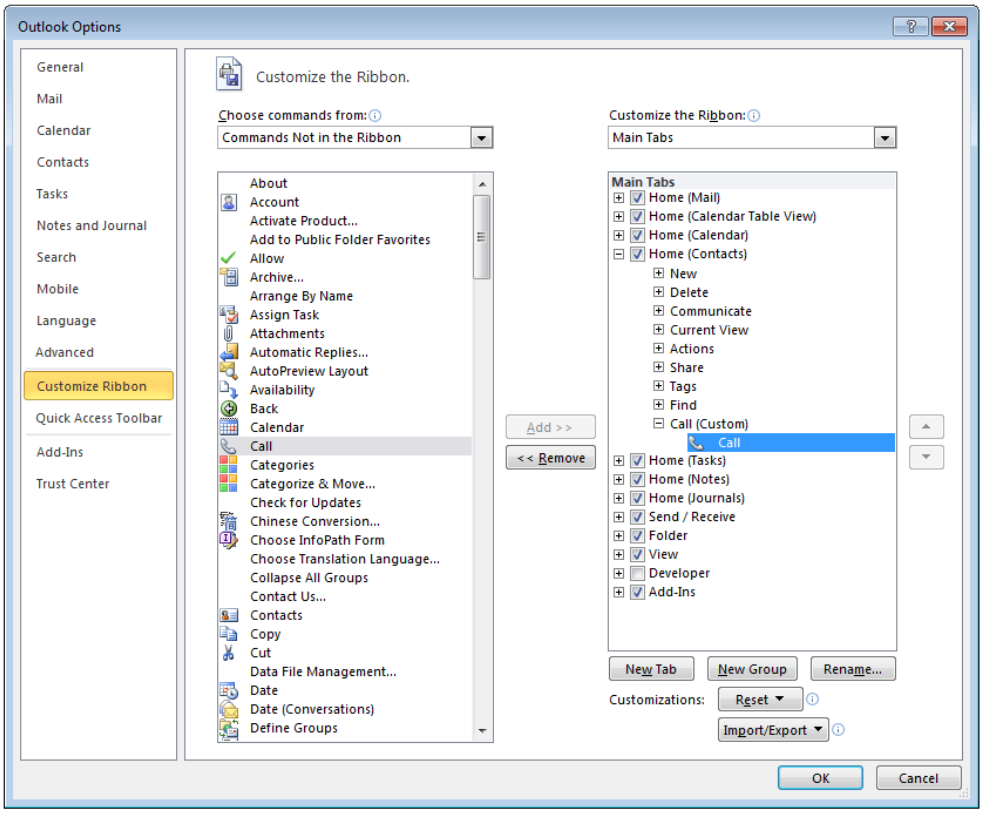

Figure 6: Outlook TAPI shortcut

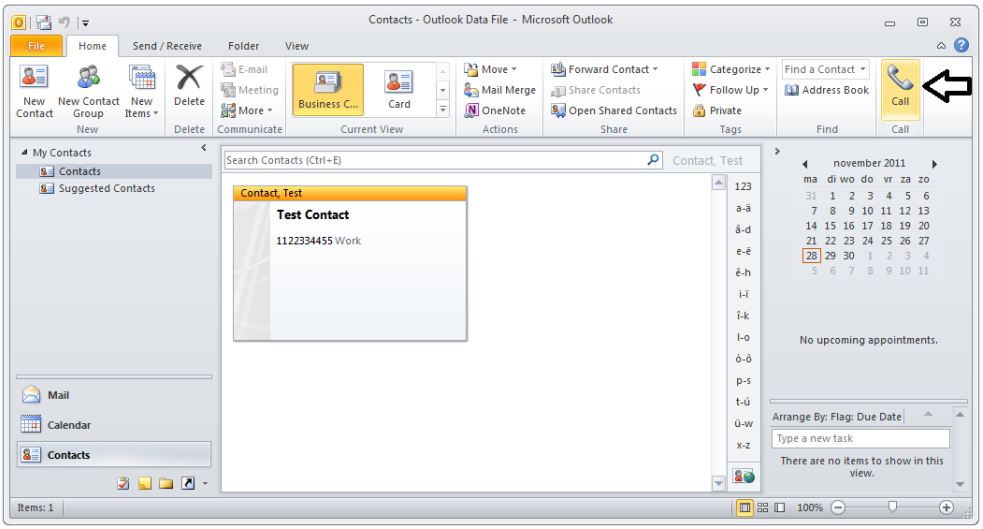

Figure 7: Outlook TAPI example

4.4 Known issues

- There is a known issue if Office 2007 or Office 2010 is used in combination with Office Communicator 2007. A description and solution of this problem can be found at http://support.microsoft.com/kb/959625/

5 XMPP presence

This manual is based on Pidgin. This XMPP-client is available for Windows and Linux. For other Operating systems, you can use iChat (Mac OS X) http://www.apple.com/support/ichat/, or any other XMPP-client.
Please use this settings to setup your XMMP-client:

- Username: your-username@uc.demo.iperity.com
- Password: Your Compass password

5.1 Installing Pidgin

Download Pidgin here: http://www.pidgin.im//. At first start Pidgin will ask for you account-details (see figure 8 on the following page). Fill in the following details:

- Address: your-username@uc.demo.iperity.com
- Password: Your Compass password

The 'Add' button will add your account to Pidgin.

5.2 Overview of XMPP-features

Once logged on, one can view queues and users. One can also start phonecalls from the XMPP-client.

5.2.1 Users

in the XMPP-client, one can see the availability of all other users:

- "On the phone with". The user is on the phone. More details are visible when available.
- "Ringing to". The user is starting a phonecall. More details are visible when available.
- "Connecting to". The user is starting a phonecall, but the phone is not ringing yet. More details are visible when available.
- "Ringing from". The phone for this user is ringing. More details are visible when available.

Users that are currently not logged in on a phone, will be invisible in the XMPP-client, or appear "offline". New users in Compass will be added to your contact-list within two hours.

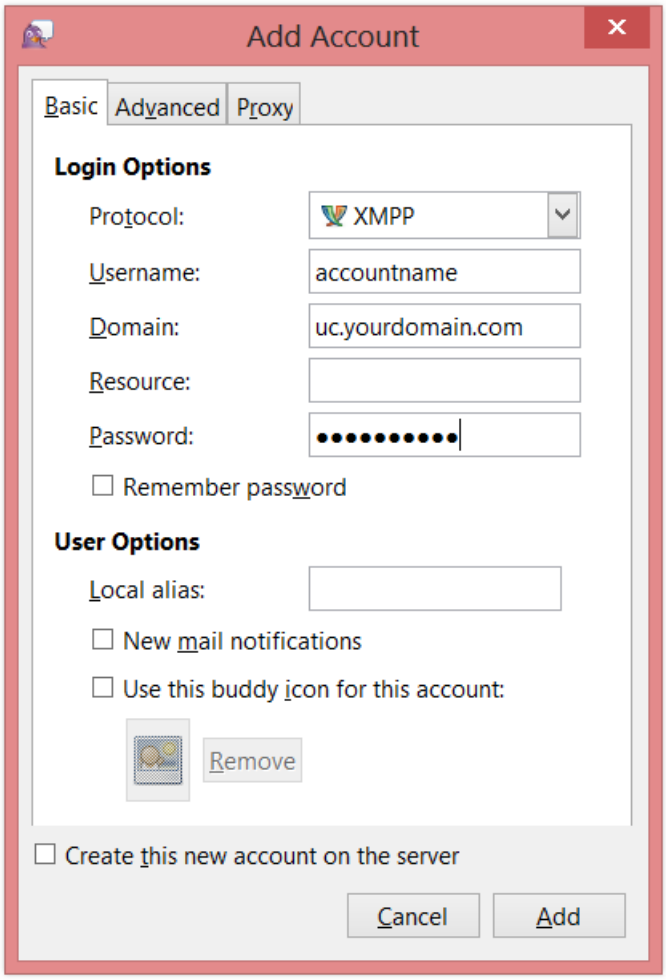

Figure 8: Configuring Pidgin

5.2.2 Queues

All queues are visible in your XMPP-client. More details are available:

- W: “Waiting”. Number of unanswered calls in this queue
- A: “Agents”. Number of agents in the queue
- R: “Ready”. Number of available agents in this queue. This will be a part of “A”
- C: “Calling”. Number of agents that will not be available, because they are on the phone

An queue without agents will show in the list, but the last 2 numbers will be invisible. New queues in Compass will be added to your contact-list within two hours.

5.2.3 Starting phonecalls

It’s also possible to start phonecalls from within your XMPP-client. If you want to call a colleague, you can preview his status within the XMPP-client. You need to start a

chat by selecting this user. In the chat screen you type the following text “!Dial”, then press Enter. Your phone will start ringing. Once you answer the call your colleague will be dialed.
There is also a group called “Company” with your company name as a user. Whenever you type a telephone number in the chat screen, your phone will start ringing. Once you answer your call, the required number will be automatically rotated and dialed. There are no restrictions for this feature regarding brand or type of telephone hardware.

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